

Important Questions You Should Ask About

Cambridge Financial Group, LLC.

1. What is Cambridge Financial Group, LLC?

Cambridge Financial Group, LLC is a fee-only personal tax and financial planning firm

2. What is a Registered Investment Advisor?

A Registered Investment Advisor is a fiduciary who has a duty of undivided loyalty to its clients and must deal fairly and honestly with them. Cambridge Financial Group, LLC is an Registered Investment Advisor.

3. What does Cambridge Financial Group, LLC sell?

We don't sell any products or investments that generate a commission. We are paid on an annual retainer and provide financial planning advice regarding taxes, investments, insurance, pensions, retirement, estate planning and general financial matters.

4. Whom do we serve?

Individuals.

5. Who can benefit most from our services?

Anyone who has financial, tax, investment, or estate needs, or who wishes to plan prudently for his or her financial future. Furthermore, persons who desire a higher, more sophisticated level of financial planning services may find our program appealing and helpful.

6. How much money do you need to become a client?

There is no minimum or maximum dollar requirement. We recognize that people with little or no assets have as much need for financial planning as those with ample assets.

7. What is a financial plan?

In-depth reviews of your financial situation, considering your goals and objectives and focusing on income tax planning, asset management, estate planning, risk management, educational planning and retirement. We analyze and recommend ways that you can achieve your financial objectives.

8. How much do we charge for planning services?

Our financial planning fees are determined by the project needed. We generally work on an annual retainer basis with a fee determined by income, assets, and complexity of the work.

9. Do we offer a tax service?

Yes. We believe income taxes are the central focal point of most financial programs. Therefore, we offer an income tax preparation service. Income tax preparation, as well as audit representation, is included under the full annual retainer agreement.

10. What type of securities do we provide advice for?

Equities, corporate bonds, commercial paper, bank deposits, municipal securities, mutual funds, limited partnerships, tax shelters, and unit investment trusts.

11. What method of analysis is used to analyze investments?

We do not use technical analysis or charting. We do use a fundamental approach, such as economic conditions, earnings, industry outlook, politics (as it relates to the investment), historical data, price-earnings ratios, dividends, general level of interest rates, company management and tax benefits.

12. Do we guarantee investment performance?

No.

13. Will client information be kept confidential?

Yes.

14. Once a plan is completed, does our relationship end?

It doesn't need to. Financial planning is a process, not an event. We offer ongoing services, periodic reviews, and day-to-day consultation if requested.

15. How do you get started?

Contact us as noted below. We can schedule a phone consultation and/or initial meeting to determine if Cambridge Financial Group, LLC can be of help to you. There is no charge for your initial consultation.

Cambridge Financial Group, Inc.

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